

Career Academy Integrated Unit Plan

Academy Name: Academy of Finance

School: Spruce Creek High School

Date Created: June 7, 2011

Created by: SCHS AOF Team

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| Integrated Unit Plan Title: AOF Leadership Conference |
| Courses to integrate: AOF Language Arts and AOF Bus Tech, Fin Operations, Fin Acct, Fin Plan |
| Grade Level: 9 - 12 |
| Timeline & Duration: Jan 27 (6 weeks preparation) |

Unit Summary: The students will research, plan and implement the Student Leadership Conference including the seminars, scheduling, advertising and budgeting. The outcome of the project will be a leadership conference.

What business and communication skills do students need to plan and coordinate an effective leadership conference?

| Overview of Activities/Lessons per Course | | | | |
|---|---|--|--------------------------------|----------------------|
| Course | Finance & Business Technology | Financial Operations | Financial Accounting | Financial Planning |
| Activity/Lesson | Conference flyer Thank you letter | Create Leadership Brochure Evaluation Tally | Create survey Create budget | Scheduling seminars |
| Course | English I Honors | English II Honors | English III Honors / AP | English IV Honors/AP |
| Activity/Lesson | Follow up letter Interview questions | Create Brochure Content Evaluation Form | Speaker bios Speaker intros | Leadership Skit |

Lesson Instructions for Leadership Conference Evaluation Form (English II Honors)

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| Standards (Performance Tasks or Course Frameworks or Sunshine State Standards): . Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.) 5. Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grades 11–12 on page 54.) 6. Use technology, including the Internet, to produce, publish, and update individual or shared writing products, taking advantage of technology’s capacity to link to other information and to display information flexibly and dynamically. |
| Rigor & Relevance (quadrant): B: Application |
| Instructions to Teacher: Discuss what would be useful and conclusive data for an evaluation form that would be used in making future decisions regarding the Academy of Finance Leadership Conference. |
| Instructions to Students: Students will make judgments on examples of effective evaluation templates and the specific information desired at the conclusion of the AOF Leadership Conference. Students will then write questions for the evaluation form. |
| Instructions for Student Accommodations: Students will be allowed to use word processing |
| Assessment for Activity: rubric |
| Approximate Length of Time for Activity: 5 class periods |
| Materials Needed: Computers, paper, printer |
| Resources Needed: Speaker’s letters, internet |
| Attachments: *Students will collect the data in their Financial Operations class. |

Lesson Instructions for Leadership Evaluation Summary (Financial Operations)

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| Standards (Performance Tasks or Course Frameworks or Sunshine State Standards): |
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| <ul style="list-style-type: none">21.0 Demonstrate mathematics knowledge and skills.22.0 Apply mathematical operations and processes as well as financial planning strategies to commonly occurring situations in the workplace to accomplish job objectives and enhance workplace performance.23.0 Apply mathematical operations and processes as well as financial planning strategies to commonly occurring personal and business situations.24.0 Assess personal strengths and weaknesses as they relate to job objectives, career exploration, personal development, and life goals. |
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| Rigor & Relevance (quadrant): |
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| Instructions to Teacher: |
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| Students will analyze data from conference evaluation and create a summary response grid. |
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| Instructions to Students: |
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| Students will create formulas to determine averages for each for survey question response. |
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| Instructions for Student Accommodations: |
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| Buddy System, teacher assistance |
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| Assessment for Activity: |
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| Participation; spreadsheet solutions |
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| Approximate Length of Time for Activity: |
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| One Week |
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| Materials Needed: |
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| Evaluation results |
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| Resources Needed: |
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| Computer Lab |
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| Attachments: |
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Lesson Instructions for Seminar Scheduling (Financial Planning)

Standards (Performance Tasks or Course Frameworks or Sunshine State Standards):

- Use oral and written communication skills in creating, expressing and interpreting information and ideas.
- Demonstrate proficiency in using microcomputer and electronic skills to perform job functions.
- Perform general organizational workplace competencies.
- Demonstrate knowledge, skill, and application of information systems to accomplish job objectives and enhance workplace performance.
- Use information technology tools.
- Develop awareness of management functions and organizational structures as they relate to today's workplace and employer/employee roles. Demonstrate initiative, courtesy, loyalty, honesty, cooperation and punctuality as a team member.
- Practice quality performance in the learning environment and the workplace.
- Incorporate appropriate leadership and supervision techniques, customer service strategies, and standards of personal ethics to accomplish job objectives and enhance workplace performance.

Rigor & Relevance (quadrant): D: Adaptation

Instructions to Teacher:

This assignment involves making the room arrangements for each breakout session of the leadership conference. Students will also divide total student attendees into sessions of 20 participants.

Students will be responsible for filling goody bags for student participants

Students will be responsible for purchase/preparation of gifts for presenters

Instructions to Students:

Prepare room labels for breakout sessions

Prepare list of attendees for each breakout session

Prepare stickers for breakout session evaluation form

Assemble goodie bags for conference

Instructions for Student Accommodations:

Buddy System

Assessment for Activity:

Conference Evaluation

Approximate Length of Time for Activity:

2 weeks

Materials Needed:

Stickers, bags, gifts, posters and/or print paper

Resources Needed:

Internet computer lab

Attachments:

Lesson Instructions for Write Speaker Introductions & Biographies (English III & IV)

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| Standards (Performance Tasks or Course Frameworks or Sunshine State Standards): Common Core Writing 1: Text Types and Purposes 2. Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content. a. Introduce a topic; organize complex ideas, concepts, and information to make important connections and distinctions; include formatting (e.g., headings), graphics (e.g., figures, tables), and multimedia when useful to aiding comprehension. b. Develop the topic with well-chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the topic. c. Use appropriate and varied transitions to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts. d. Use precise language and domain-specific vocabulary to manage the complexity of the topic. e. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. f. Provide a concluding statement or section that follows from and supports the information or explanation presented (e.g., articulating implications or the significance of the topic). Rigor & Relevance (quadrant): D: Adaptation |
| Instructions to Teacher: these activities are in coordination with Finance and Business Technology, Financial Accounting, Financial Operations, and English I, II, III, and IV (including English III AP) |
| Instructions to Students: write brief introductions for speakers and follow up questions for seminars; compose and send thank you letters |
| Instructions for Student Accommodations: students will be permitted to use word processing |
| Assessment for Activity: Rubric |
| Approximate Length of Time for Activity: 6 weeks from introduction of conference planning to culminating activity – the conference |
| Materials Needed: computer, printer, stationery, pens, stamps |
| Resources Needed: names, pronunciation, details about speakers |
| Attachments: |

Lesson Instructions for Leadership Skit (English IV)

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| Standards (Performance Tasks or Course Frameworks or Sunshine State Standards): Common Core Writing 1:); 4. Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.) 5. Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grades 11–12 on page 54.) 6. Use technology, including the Internet, to produce, publish, and update individual or shared writing products, taking advantage of technology’s capacity to link to other information and to display information flexibly and dynamically. Rigor & Relevance (quadrant): D: Adaptation |
| Instructions to Teacher: Students will brainstorm for ideas that are relevant, entertaining, and appropriate for producing a 5 – 10-minute skit. They’ll need to coordinate topics, costumes, etc. – and practice. |
| Instructions to Students: write and perform a skit for opening ceremony; submit a written script |
| Instructions for Student Accommodations: |
| Assessment for Activity: Rubric |
| Approximate Length of Time for Activity: 4 – 5 weeks; some practice time in class if necessary |
| Materials Needed: Computer, printer, paper |
| Resources Needed: |
| Attachments: |

Lesson Instructions for AOF Conference Flyer (Finance and Business Technology)

Standards (Performance Tasks or Course Frameworks or Sunshine State Standards):

- 01.01 Select and employ appropriate communication concepts and strategies to enhance oral and written communication in the workplace. CM 1.0
- 01.02 Locate, organize and reference written information from various sources. CM 3.0
- 02.01 Apply the following tools to increase work efficiency: word processing, database, spreadsheet programs, presentation programs, web design, email systems, and the Internet.
- 08.01 Describe and use current and emerging computer technology and software to perform personal and business related tasks.
- 10.01 Employ technological tools to expedite workflow including word processing, databases, reports, spreadsheets, multimedia presentations, electronic calendar, contacts, email, and internet applications. IT 2.0
- 10.02 Employ computer operations applications to access, create, manage, integrate, and store information. IT 3.0

Rigor & Relevance (quadrant): C: Assimilation

Instructions to Teacher: Students are to create a flyer with all the pertinent details for the Leadership Conference. Flyers can be posted throughout the school. This project should be completed after topics for the seminars have been chosen.

Instructions to Students: Using the information about the Leadership Conference create a flyer that will advertise the Leadership Conference to the Academy of Finance students.

Instructions for Student Accommodations: Additional time, peer assistance

Assessment for Activity: Rubric

Approximate Length of Time for Activity: 50 minutes

Materials Needed: Seminar topics, paper

Resources Needed: Computers with internet access, printer

Attachments: Grading rubric

Lesson Instructions for Follow Up Letter (English I Honors)

Standards (Performance Tasks or Course Frameworks or Sunshine State Standards):

Initiate and participate effectively in a range of collaborative discussions(one-on-one, in groups, and teacher-led) with diverse partners on grades 9–10 topics, texts, and issues, building on others' ideas and expressing their own clearly and persuasively. A. Come to discussions prepared, having read and researched material under study; explicitly draw on that preparation by referring to evidence from texts and other research on the topic or issue to stimulate a thoughtful, well-reasoned exchange of ideas .B. Work with peers to set rules for collegial discussions and decision-making(e.g., informal consensus, taking votes on key issues, presentation of alternate views), clear goals and deadlines, and individual roles as needed. C Propel conversations by posing and responding to questions that relate the current discussion to broader themes or larger ideas; actively incorporate others into the discussion; and clarify, verify, or challenge ideas and conclusions. d. Respond thoughtfully to diverse perspectives, summarize points of agreement and disagreement, and, when warranted, qualify or justify their work

Rigor & Relevance (quadrant): Comprehension and Collaboration

Instructions to Teacher:

These activities are in coordination with Finance and Business Technology, Financial Accounting, Financial Operations, and English I, II, III, and IV (including English III AP)

Instructions to Students:

Students will write a follow up letter addressed to each speaker confirming the time, location, and any necessary technical or communicative devices needed as accommodations.

Instructions for Student Accommodations:

Students will be permitted to use word programs as an accommodation when completing this assignment.

Assessment for Activity:

Assessment for this activity will occur by use of the attached rubric.

Approximate Length of Time for Activity:

The approximate length of time needed for this activity will be 5 to 7 days.

Materials Needed:

Materials needed for this activity are paper, pen/pencil, and a computer.

Resources Needed:

Students will need scheduling information from the Finance Department when writing the confirmation letter.

Attachments: Rubric

Lesson Instructions for Interview Questions (English I Honors):

Standards (Performance Tasks or Course Frameworks or Sunshine State Standards):

Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content. a. Introduce a topic; organize complex ideas, concepts, and information to make important connections and distinctions; include formatting (e.g., headings), graphics (e.g., figures, tables), and multimedia when useful to aiding comprehension. Develop the topic with well-chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and example appropriate to the audience's knowledge of the topics. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing.

Rigor & Relevance (quadrant): B: Application

Instructions to Teacher:

These activities are in coordination with Finance and Business Technology, Financial Accounting, Financial Operations, and English I, II, III, and IV (including English III AP

Instructions to Students:

Students will brainstorm and compose relevant questions as a follow up action after each speaker's individual conference presentation.

Instructions for Student Accommodations:

Student accommodations include the use of a computer to research relevant questions.

Assessment for Activity:

Assessment will be done using the attached rubric.

Approximate Length of Time for Activity:

The approximate length of time needed for this activity will be 3-5 days.

Materials Needed:

Materials needed are a pen/pencil, paper, and computer.

Resources Needed:

Resources needed include information on each topic being presented in the individual seminars.

Attachments:

Assessment rubric.

Lesson Instructions for Conference Survey & Budget (Financial Accounting)

Standards (Performance Tasks or Course Frameworks or Sunshine State Standards):

11.0 Apply communication skills (reading, writing, speaking, listening, and viewing) in a courteous, concise, and correct manner on personal and professional levels.

28.0 Apply mathematical operations and processes as well as financial planning strategies to commonly occurring situations in the workplace to accomplish job objectives and enhance workplace performance.

Rigor & Relevance (quadrant): D: Adaptation

Instructions to Teacher:

Create account in free survey monkey, establish survey theme, students create survey questions on the following: topics for conference, type of food, selection of AOF goody bag items. Have all classes take survey, students create excel spreadsheet with results and disseminate the information and compare with budget. Prepare orders for gifts and food.

Instructions to Students:

Write survey questions, create excel spreadsheet and disseminate the information and make sure we are within budget, research gifts, purchase gifts, disseminate what type of food, contact business, find prices within budget , order and follow through until leadership conference. (may want to break up between classes)

Instructions for Student Accommodations:

Buddy System

Assessment for Activity:

Survey results, rubric for survey, Successful completion of the leadership conference

Approximate Length of Time for Activity:

6 weeks

Materials Needed:

Computer, Internet

Resources Needed:

Attachments:

See *Creating a Survey* Attachment

Lesson Instructions for Leadership Brochure - Writing (English II Honors)

Standards (Performance Tasks or Course Frameworks or Sunshine State Standards): 4. Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.) 5. Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grades 11–12 on page 54.) 6. Use technology, including the Internet, to produce, publish, and update individual or shared writing products, taking advantage of technology’s capacity to link to other information and to display information flexibly and dynamically.

Rigor & Relevance (quadrant): D: Adaptation

Instructions to Teacher: Students will use information obtained from speaker’s letters and internet research to write descriptions of the various breakout sessions in the Academy of Finance Leadership Conference. The descriptions will be used on a brochure to advertise for the conference.

Instructions to Students:

Students will write descriptions of each break out session the Academy of Finance Leadership Conference offers based on information obtained from speaker’s letters and also research in order to construct a brochure in Financial Operations class.

Instructions for Student Accommodations:

Students will be allowed to use word processing

Assessment for Activity:

rubric

Approximate Length of Time for Activity:

5 class periods

Materials Needed:

Computers, paper, printer

Resources Needed:

Speaker’s letters, internet

Attachments:

Lesson Instructions for Leadership Brochure (Financial Operations)

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| Standards (Performance Tasks or Course Frameworks or Sunshine State Standards): |
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| 25.0 Demonstrate language arts knowledge and skills. |
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| 26.0 Apply communication skills (reading, writing, speaking, listening, and viewing) in a courteous, concise, and correct manner on personal and professional levels. |
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| Rigor & Relevance (quadrant): C: Assimilation |
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| Instructions to Teacher: |
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| Communicate with Language Arts teacher to create a level of understanding of topics researched and obtained from speakers for soft skills brochure information. |
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| Instructions to Students: |
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| Using information obtained from participating speakers and internet research students will create brochures on topics that will be presented in breakout sessions of student leadership conference. Brochures will be either single fold (four panels) or two-fold brochure (six panels). Brochures should include topic title, graphics, quotes, illustrations for topic use. |
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| Instructions for Student Accommodations: |
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| Buddy system |
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| Assessment for Activity: |
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| Brochure Rubric |
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| Approximate Length of Time for Activity: |
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| 1 week |
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| Materials Needed: |
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| Colored paper |
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| Resources Needed: |
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| Access internet computer lab, printer |
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| Attachments: |
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| Brochure Rubric, Brochure handout |
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Create a single-fold (4 panel)

Layout Suggestions:

Inside Left Panel

Reasons why is “topic” important

Or

Businesses with outstanding “topic”

Or

Define “topic”

Brochure concerning

Layout Suggestions:

Inside Right Panel

Rules of “topic”

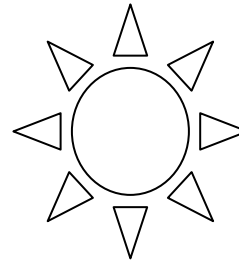
Customer Service

Layout Suggestions:

Back Panel

Include quote concerning “topic”

Insert a graphic/clip art/etc



See Your Teacher for set-up instructions

Layout Suggestions:

Front Panel

**Catchy Title
Concerning
Customer Service**

Insert Clip Art

Your Name
Period
Date

Rubric for Research Assessment

Specific Activity: _____

| CATEGORY | 4 | 3 | 2 | 1 |
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| Group Timeline | Group independently develops a reasonable, complete timeline describing when different parts of the work (e.g., planning, research, first draft, final draft) will be done. All students in group can independently describe the high points of the timeline. | Group independently develops a timeline describing when most parts of the work will be done. All students in group can independently describe the high points of the timeline. | Group independently develops a timeline describing when most parts of the work will be done. Most students can independently describe the high points of the timeline. | Group needs adult help to develop a timeline AND/OR several students in the group cannot independently describe the high points of the timeline. |
| Questions, comments, suggestions (feedback, discussion) on at least two presentations | All questions, discussion and feedback are very constructive providing ideas for additional resources or improvements | Some questions discussion and comments are useful positive but not specific they identify general judgments | All questions discussion and comments are useful but judgmental and some might appear less than constructive | No comments provided |
| Oral and/or written presentation is clear and can be followed and responded to | The unit of work or resource is presented in a clear way with instructions and is presented in a logical or step by step way that provides appropriate opportunities questions or suggestions for ways to participate or to respond to the resource. | The unit of work or resource is presented with some instructions but it is not presented in a logical or step by step way and does not provides many or any opportunities and suggestions for ways to participate or to respond to the resource. | The unit of work is presented, but there is no provision for trying out and any opportunity to respond. | The unit of work may be presented, but presentation is poorly prepared and planned. |
| Ideas/Research Questions | Members independently identify at least 4 reasonable, insightful, creative ideas/questions to pursue when doing the project | Members independently identify at least 4 reasonable ideas/questions to pursue when doing the project | Members identify, with some adult help, at least 4 reasonable ideas/questions to pursue when doing the project | Members identify, with considerable adult help, 4 reasonable ideas/questions to pursue when doing the project |
| Delegation of Responsibility | Each student in the group can clearly explain what information is needed by the group, what information s/he is responsible for locating, and when the information is needed. | Each student in the group can clearly explain what information s/he is responsible for locating. | Each student in the group can, with minimal prompting from peers, clearly explain what information s/he is responsible for locating. | One or more students in the group cannot clearly explain what information they are responsible for locating. |

Leadership Flyer Rubric

| | 4 | 3 | 2 | 1 |
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| Attractiveness & Organization | The flyer has exceptionally attractive formatting and well-organized information. | The flyer has attractive formatting and well-organized information. | The flyer has well-organized information. | The flyer formatting and organization of material are confusing to the reader. |
| Writing - Grammar | There are no grammatical mistakes on the flyer. | There are 1-2 grammatical mistakes on the flyer. | There are 3-4 grammatical mistakes on the flyer. | There are more than 4 grammatical mistakes on the flyer. |
| Content - Accuracy | Includes name, time, date and location. | 1 important fact about the conference is missing from the flyer. | 2 important facts about the conference are missing from the flyer. | 3 or more important facts about the conference are missing from the flyer. |
| Graphics/Pictures | Graphics go well with the text and there is a good mix of text and graphics. | Graphics go well with the text, but there are so many that they distract from the text. | Graphics go well with the text, but there are too few and seems "text-heavy". | Graphics do not go with the accompanying text or appear to be randomly chosen. |
| Readability | Flyer is easy to read and understand from 10 ft. away | Flyer is easy to read and understand from 5 ft. away | Flyer is readable only at arm's length. | Flyer is unreadable. |

Creating a Survey Rubric

| CATEGORY | 4 | 3 | 2 | 1 |
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| Required Elements | The survey includes all required elements as well as additional information. | All required elements are included in the survey. | All but 1 of the required elements are included on the survey. | Several required elements were missing. |
| Attractiveness | The survey is exceptionally attractive in terms of design, layout, and neatness. | The survey is attractive in terms of design, layout and neatness. | The survey is acceptably attractive though it may be a bit messy. | The survey is distractingly messy or very poorly designed. It is not attractive. |
| Title | Title is quite creative. | Title describes content well. | | The title does not describe the content of the survey well. |
| Idea | Independently identified a question which was interesting to the student and which could be investigated. | Identified, with adult help, a question which was interesting to the student and which could be investigated. | Identified, with adult help, a question which could be investigated. | Identified a question that could not be investigated or one that did not merit investigation |

Leadership Brochure Rubric

| CATEGORY | 4 | 3 | 2 | 1 |
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| Content - Accuracy | All included information is useful for this brochure's purpose. | 99-90% of included information is useful for this brochure's purpose. | 89-80% of included information is useful for this brochure's purpose. | 89-80% of included information is useful for this brochure's purpose. |
| Attractiveness & Organization | The brochure has clearly defined section labels and attractive use of font, type style and size. | The brochure has clearly defined section labels but lacks attractive use of font, type style and size. | The brochure lacks clearly defined section labels but uses attractive font, type style and size. | The brochure lacks clearly defined section labels and also lacks attractive use of font, type style and size. |
| Writing - Grammar | The brochure is written in professional manner, with correct capitalization and punctuation. | The brochure is written in professional manner, with one or two capitalization and/or punctuation errors. | The brochure is written in professional manner, with three or four capitalization / punctuation errors. | The brochure is not written in a professional manner and/or has many capitalization/punctuation errors. |
| Brochure Front | Includes Title, picture, your name, and period. | One missing element. | Two missing elements. | Three or more missing elements. |
| Spelling & Proofreading | No spelling errors. | 1 spelling error. | 2-3 spelling errors. | More than 3 spelling errors. |

| General Writing Rubric | | | | |
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| Standard | 1 (I→F) | 2 (C) | 3 (A) | 4 (A+) |
| W 1.2 | <i>Below Proficient</i> | <i>Proficient</i> | <i>Mastery</i> | <i>Above Mastery</i> |
| Write informative/explanatory texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content. | The student writes informative/explanatory texts that examine basic ideas and information in a simple and vague manner. | The student writes informative/explanatory texts that examine and convey complex ideas and information clearly and accurately. | The student writes informative/explanatory texts that examine and convey complex ideas and information precisely. | The student writes informative/explanatory texts that examine and convey higher order thinking with precision and insight. |
| Standard | 1 (I→F) | 2 (C) | 3 (A) | 4 (A+) |
| W 1.6 | <i>Below Proficient</i> | <i>Proficient</i> | <i>Mastery</i> | <i>Above Mastery</i> |
| Use technology, including the Internet, to produce and publish writing and to interact and collaborate with others. | The student does not use technology to produce and publish writing and/or does not interact and collaborate with others. | The student uses technology to produce and publish writing and shows some interaction and collaboration with others. | The student uses technology to produce and publish writing and interacts and collaborates with others. | The student uses technology, including the Internet, to produce and publish writing and to interact and collaborate with others. |